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NEIGHBORHOOD

HOUSING & DEVELOPMENT

PROCEDURES MANUAL

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NHD PROCEDURES MANUAL

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I. INTRODUCTION

A. NHD MISSION AND MANAGEMENT PRIORITIES

The Department of Neighborhood Housing & Development (NHD) coordinates community participation in the Boston Redevelopment Authority's (BRA) planning and economic development activities. NHD formulates and implements housing and economic development programs for Boston's neighborhoods.

To fulfill these obligations and to produce quality products in an efficient manner, the Department continually redefines its functions and reassigns staff to better match skills and abilities with programmatic needs. NHD clearly delineates staff responsibilities via concrete performance criteria. In addition, steps have been outlined to improve the flow of information and communication within NHD and throughout the Authority.

The purpose of this Procedures Manual, therefore, is to:

- * Clearly define the Department's goals and objectives;
- * Identify problems presently inhibiting quality performance;
- * Develop administrative programs and procedures to ameliorate the problems inhibiting staff performance;
- * Establish a set of standards by which the staff can monitor and direct their efforts in an efficient and productive manner.

NHD presents this Procedures Manual in a workable format in order to provide the staff with criteria for evaluating improvement and to enable the Department to meet existing goals and objectives as well as new challenges and demands. A companion volume, the NHD Quarterly Report, describes the department's priority projects and planning activities, and includes quarterly goals and projected milestones. These documents will be revised quarterly in order to track the departments progress, problems and future goals. The NHD Procedures Manual should be regarded as a working plan and administrative resource for all staff members.

B. NHD OPERATIONAL AND FUNCTIONAL STRUCTURE:

NHD staff perform numerous functions, as described below, providing the expertise necessary to implement the department's projects and initiatives. Although a set of responsibilities for each position is outlined, staff members are expected to take the initiative, as appropriate, to perform additional functions in order to insure product quality.

Assistant Director: Under the guidance of the Director, provides overall direction for Housing and Economic development initiatives. Responsible for all department presentations to the BRA Board and for negotiations with developers, community representatives and governmental actors. Furthermore, monitors staff activities and progress, insuring that the department operates efficiently and productively.

Special Assistant: Provides project management assistance and administrative support to the Assistant Director. Coordinates the Assistant Director's staff operations with the office of the Director, the Mayor's Office, and NHD community participation staff.

Secretary: Provides administrative and clerical support. (See Secretarial Procedures section for more detail).

Deputy Director for Housing: Responsible for the development of department housing policies and procedures. Accountable for their implementation by project managers for all housing projects. Supervises housing staff activities and monitors housing project performance.

Deputy Director for Economic Development: Responsible for the formulation of economic development policies and procedures. Accountable for their implementation by project managers and economic development staff. Supervises economic development staff activities and monitors project performance.

Director of South End Planning and Development: Responsible for overall management of South End planning and development activities including oversight of the South End Neighborhood Housing Initiative and the South End Development Policy planning process.

Project Manager: Accountable to the Deputy Directors and Assistant Director for the management and coordination of a project, including zoning approval, finance and public subsidy, design review, community review, environmental impact, capital improvements, disposition and legal agreements, approvals and permitting. Primary project contact person for developers, community representatives and BRA staff.

Project Assistant: Provides assistance in project management as directed by Assistant Director, Deputy Directors, and Project Managers. May assume responsibility for smaller projects, supervised by Project Manager.

Administrative Assistant: Develops and implements systems for managing department information and strategies for improved management of department staff and activities to improve the timeliness and quality of NHD products. Provides administrative support and assistance on special projects to the Assistant Director.

Business Relocation/Special Projects Manager: Manages the business relocation program for department projects. Administers relocation services for the City and State departments under contract. Manages or supervises management of Special Projects in coordination with the Assistant Director.

Building Rehabilitation Manager: Responsible for the management and coordination of building rehabilitation projects, including expertise in building rehabilitation needs assessment, engineering, and lease negotiation and production.

Community Process Coordinator: Develops and implements systems for the Assistant Director to facilitate communication with neighborhood groups and individuals, including an annotated listing of active community organizations.

Fair Housing Coordinator: Acts as BRA liaison with the Boston Fair Housing Commission for both policy and development issues. Provides support to the Fair Housing Commission as needed. Coordinates Fair Housing activities for all new housing development.

Financial Analyst: Analyzes the financial feasibility of projects and coordinates project applications for public subsidy.

Figures 1 and 2 on the following pages illustrate the department's staff assignments by function (Affordable Housing Production/Neighborhood Economic Development) and by neighborhood (South End/Chinatown/Roxbury). Members of other departments who actively participate in the management of NHD projects are listed in brackets "[]":

Figure 1:

**NEIGHBORHOOD HOUSING AND DEVELOPMENT
ORGANIZATIONAL CHART BY FUNCTION**

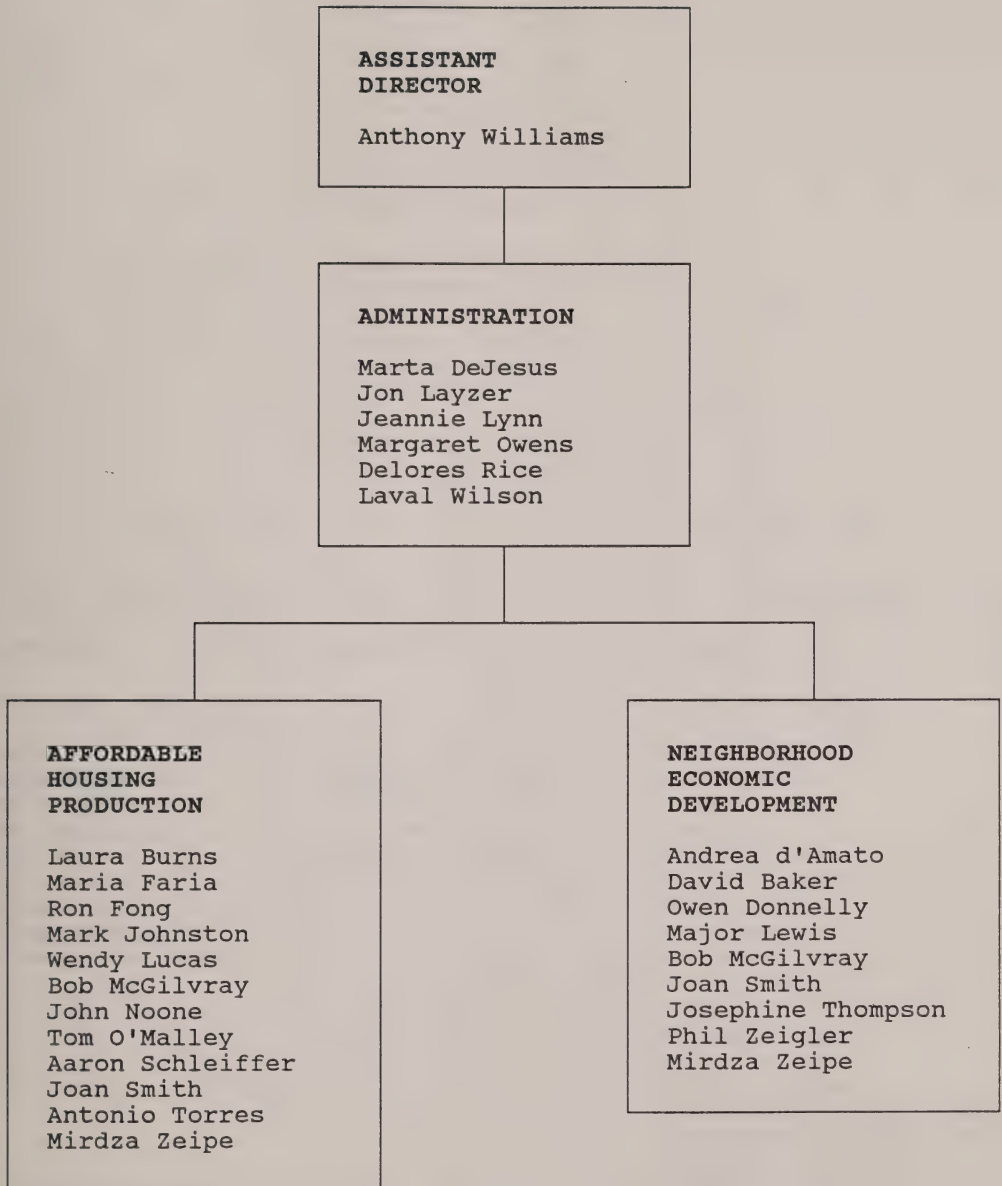
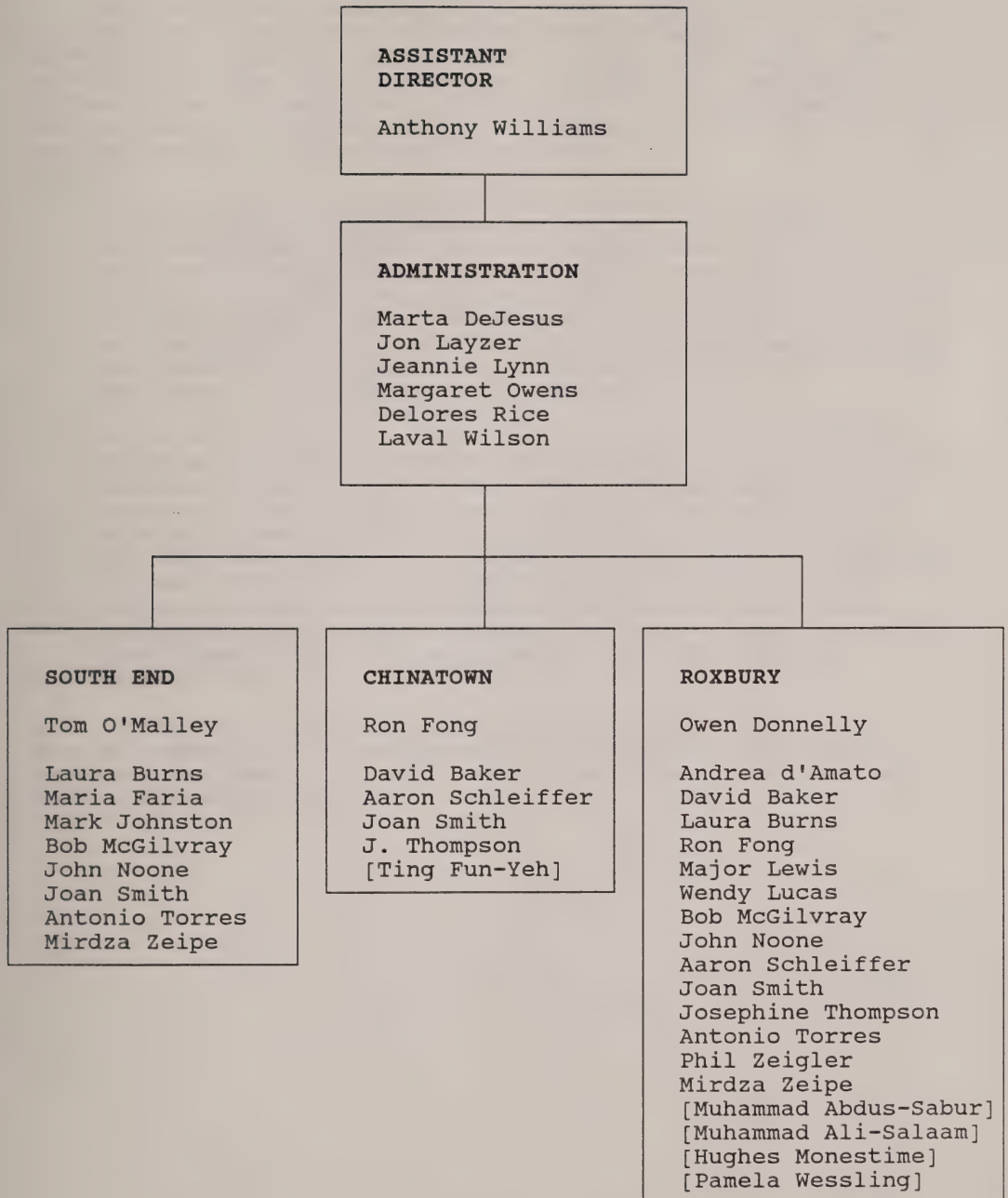


Figure 2:

NEIGHBORHOOD HOUSING AND DEVELOPMENT
ORGANIZATIONAL CHART BY NEIGHBORHOOD



C. MAJOR ADMINISTRATIVE GOALS

NHD is in the forefront of the BRA's effort to bridge the gap between neighborhood needs and downtown prosperity. The department's functions and responsibilities continue to grow, necessitating the establishment of an effective management system. The challenge is to refine NHD's administrative programs and procedures. To respond to the challenge, the department has adopted the following general guidelines:

- * Projects will be monitored via the establishment and utilization of a **quality review system**. To insure quality and consistency in NHD products, department staff are encouraged to have others review their work. In cases where a team is assigned to produce a specific product, the team is encouraged to establish simple procedures for reviewing and improving staff contributions. A quality review system has already been established for the Board Process and will continue to be a management priority.
- * Department staff are encouraged to utilize a **team approach** to effect the goal of efficient process. This approach will maximize communication within and among BRA departments in order to enhance collective efforts and talents, and to provide access to information and other resources vital to project development. The objective is to take advantage of the existing pool of resources within the BRA so that members from all departments within the BRA share their skills and specialized knowledge in order to produce quality development plans and programs for the City and the neighborhoods.

To implement these management goals, NHD has initiated several administrative programs and procedures. NHD's most important management initiatives are described in greater detail in the following pages.

II. BRA BOARD REVIEW PROCESS

Activity Description: Neighborhood Housing and Development produces a large percentage of the memos submitted to the BRA board. The Assistant Director has made a commitment to ensure well written board memos that are produced in a timely manner and in compliance with performance criteria. The NHD Project Directory will be used as a tool in predicting upcoming board actions. In addition, the NHD review process will guarantee the execution of quality board presentations.

Performance Criteria:

- * Use the quality review system to review all board memos before they leave the department;
- * Comply with deadlines established by the Director's office;
- * Anticipate board actions thru the use of the Project Directory as an accurate department guide;
- * Use guidelines established by the Housing Production Committee;

Status: A memo describing a system to better manage the Board Process was distributed to staff on October 7, 1988. A team meets regularly to review board memos, promptly returning them to project managers for final revisions. The standards used to review board memos are:

- * Proposed board action complies with Authority policy;
- * Board submission is complete in form and content;
- * The priority of the request for board action is assessed among other requests for target Board meeting;
- * Actions to be taken prior to Board meeting are identified to resolve outstanding issues.

Jeannie Lynn is assigned to coordinate the process and to act as the primary contact person with Elaine Hale. Owen Donnelly, Ron Fong, Beverly Johnson, Jeannie Lynn, Tom O'Malley and Tony Williams constitute the review team. Several days before a Board meeting, the Assistant Director is briefed; presentations are defined and parties attending the Board meeting are identified and confirmed.

Procedures:

NAME	ACTIVITY
Lynn	Immediately following board meeting, NHD due date is established for next board meeting
Lynn	Collects and distributes board packages for review by NHD team
Review team	Review to ensure quality production of memos and presentations
Project Manager	Makes suggested revisions and returns copies to Lynn
	Obtains NHD, Legal, and Finance clearance signatures and forwards memo and clearance sheet to Aaron Prince to complete routing in the Director's office
	Ensures completion of clearance process by Director's office deadline

REQUEST FOR BOARD ACTION

TO: ANTHONY WILLIAMS

FROM:

DATE:

SUBJECT:

1. BOARD DATE REQUESTED:

2. BOARD ACTION SOUGHT:

3. JUSTIFICATION FOR REQUESTED BOARD DATE:

Provide a reason for needing this date, for example:

- market changes,
- end of the year tax credits
- front office priority, etc.

4. OUTSTANDING OR POTENTIAL ISSUES:

Any issue or problem that may arise before or at the Board meeting, for example:

- opposition from a neighborhood group or leader,
- legal issues,
- financing needs to be refined and secured, etc.

5. PROPOSED PREPARATION FOR BOARD MEETINGS:

Steps taken to mitigate potential problems, for example:

- designing new graphics,
- meeting with members from the neighborhood,
- negotiating with the MDA/MBE,
- collection of letters from community, etc.

DO NOT OMIT ANY CATAGORIES

PROJECT FACT SHEET

1. PROJECT NAME OR PARCEL:
Roxbury Post Office, Parcel 2-C
2. PROJECT MANAGER AND TEAM:
3. DEVELOPER/ADDRESS:
Please provide the name of the developer and their business address.
4. SITE LOCATION:
Street address, neighborhood and state whether this project is located within an urban renewal area.
5. PARCEL DESCRIPTION:
Please provide the following information:
 - GSF of parcel
 - Existing land use (vacant)
 - Building size (if appropriate)
 - ownership (BRA, PFD, MBTA etc).
6. ACTION REQUESTED:
What is the specific Board decision sought, for example,
 - certificate of completion.
7. PREVIOUS BOARD ACTIONS:
List any significant previous Board actions taken and their associated dates, for example:
 - Public Hearing: 10/31/88 taken under advisement.
 - tentative designation: 11/10/88 Board tabled.
 - parcel conveyed: 12/23/88 (etc)
8. DEVELOPMENT PROGRAM:
Please outline the specific program the project is expected to follow and include information concerning the number of units, % affordable, parking requirements and type (above/below grade, levels etc), SF and types of use (retail, housing etc).
9. TOTAL DEVELOPMENT COSTS:
Simply state the expected associated costs of development for both acquisition and development of land and project, for example:
 - \$66,000,000. of which \$2,500,000 is for land acquisition.
10. ZONING:
Please provide all zoning issues related to project, for example:
 - compliance with existing zoning codes,
 - specify any zoning deviations/variations required,

- any expected appearance before Board of Appeals.
- 11. DESIGN:
State exactly, where the project is in the schematic design process, for example:
 - schematic,
 - design development,
 - final plans.
- 12. FAIR HOUSING PLAN:
Please state where the project stands in the Fair Housing and marketing plan. The Project Manager need to consult with Joan Smith for this information.
- 13. COMMUNITY REVIEW:
Please describe the stages of community review, neighborhood participation, and local leadership effort and support the project has received or experienced.
- 14. NOTIFICATION OF MONS:
The Mayor's Office of Neighborhood Services (MONS) should be notified of the project. Explain in detail any actions taken with MONS or reasons for not contacting the agency. Support should also be solicited if it is appropriate for the project.
- 15. TRANSPORTATION ACCESS PLAN:
Please describe the status of the project's preparation of such plan. This plan is only required for:
 - Commercial/retail with +50,000 SF &
 - Housing with + 30 units.
- 16. CENTRAL REGISTER NOTICE:
Please note the dates when the notice appeared in the central registry.
- 17. BRA APPRAISAL:
Please state whether it is necessary for Pat Twohig in real estate services to prepare or recommend an appraisal and sale price to the Board.
 - This is a necessary step for a project seeking tentative designation status.
- 18. ENVIRONMENTAL CLEARANCE:
Please describe whether an Environmental Notification Form (ENF) was files and the date. Describe whether is will have to comply with MEPA standards.

DO NOT OMIT ANY CATEGORIES!

CLEARANCE AND SIGNATURE REQUEST

ADDRESSEE: BRA Board &
Stephen Coyle

LOG NO:

ORIGINATOR: A. Williams
R. Fong

FILE:

SUBJECT: Grant to developers of
Parcel R-3/R-3A

DATE RETURNED:

SUMMARY:

Staff recommends that the Director be authorized to enter into an agreement with the New England Medical Center (NEMC) to accept their voluntary contribution of \$50,000 for appropriate uses in Chinatown; and that the Director be further authorized to enter into agreements with R-3A Associates Limited Partnership and the Asian Community Development Corporation (ACDC) to provide a grant of \$50,000, contributed by NEMC, to R-3A Associates and ACDC for pre-construction expenses incurred by the development of BRA Parcel R-3/R-3A.

COMMENTS:

ORIGINATOR'S APPROVAL:	CLEARED BY:	CLEARED BY:	CLEARED BY:	CLEARED BY:	DIRECTOR'S STAFF	DIRECTOR'S STAFF
<i>Routing</i>		<i>Dept. Head</i>	<i>Law</i>	<i>Finance</i>		
Fong		Williams	McNeil	Noonan	Johnson	Chandler
					McCann	Grace

RETURN APPROVED REQUESTS TO THE ORIGINATOR

III. COMMUNITY PARTICIPATION

A. POLICIES AND PROCEDURES

Comments from community residents provide the most accurate indicator of a successful community participation program. All projects must incorporate community comments from the initial stages through completion of construction; even if the comments of neighborhood residents cannot be included in a development, community residents must have the opportunity to voice their concerns to the developer, the BRA, and other involved parties.

The City administration has developed policies to develop affordable housing, improve neighborhood environments, and increase economic opportunities specifically in Boston's blighted neighborhoods. The BRA, as Boston's planning agency, has worked with these communities to achieve these goals. In particular, the staff of Neighborhood Housing and Development regularly meet with community leaders and residents to address their concerns. So far this year department staff have attended over seventy five community meetings.

Role of the Staff

The role of the staff in the community participation process is important. Working together, the project manager, the Assistant Director, and the community participation team share responsibility for implementing several community outreach mechanisms. The success of NHD's community participation efforts depends on this team effort. In this section, the role of each member of the team is clearly defined.

Project Manager: Ultimately responsible for ensuring that all channels of communication between neighborhood residents, neighborhood planners and the developers remain open. The project manager also is responsible and accountable for the implementation of specific community participation mechanisms, including:

- * Responding to community residents
- * Attending community meetings
- * Developing project updates
- * Keeping a history of correspondence, record phone calls, letters, meetings, etc.

Assistant Director: Serves as the chief negotiator between the BRA planning staff, developers, and community residents, the Assistant Director also resolves conflicts in the management of a project. All correspondence between the project manager and community residents should be copied to the Assistant Director. The Assistant Director will be responsible for the implementation of the community participation program and will routinely review the performance of department staff, including project managers, the community process coordinator, and the support staff as it relates to the community participation program.

Community Participation Team: Works with the Assistant Director and the project managers to communicate with neighborhood groups and individuals. The community participation team shares responsibility for informing neighborhood residents about NHD community meetings. The team provides technical assistance to department staff, supplying the names, addresses and phone numbers of neighborhood residents and organizations, as well as current mailing lists for use with WordPerfect's Mail Merge. The community participation team has the following responsibilities:

- * Assisting project managers in developing updates
- * Developing a community mailing list
- * Maintaining a community tracking system
- * Producing newsletters

B. COMPONENTS

Some common denominators can be identified in a successful community participation program and are detailed in this section. The following systems constitute an adequate community participation program and are described in greater detail in this section:

- 1) Timely Response to community residents
- 2) Community meetings
- 3) Development of Project Updates
- 4) Development of a community mailing list
- 5) Community tracking
- 6) Community Newsletter (Roxbury)

1) TIMELY RESPONSE TO COMMUNITY RESIDENTS

Activity Description: To improve community perceptions of the BRA, in general, and NHD in particular, the department must respond in a timely fashion to all community groups and representatives. Neighborhood residents should be contacted within two days of the receipt of an inquiry by the department. Further, project managers must keep accurate records of correspondence with developers and community leaders.

Performance Criteria:

- * Respondents (NHD staff) will act within two days of the receipt of correspondence from community residents;
- * Correspondence History Sheet - Records of correspondence, written and personal, with neighborhood groups or residents will be kept by project managers
- * Project managers shall notify the Assistant Director of project status, and specifically, send copies of significant correspondence with community residents.

Procedures:

NAME	ACTIVITY
Project Manager	Promptly contacts individuals or groups with a request, maintains a history of project related correspondence
Assistant Director	Responds to the concerns of community residents as necessary.
Community Participation Team	Refers community residents to the project manager for response.

2) COMMUNITY MEETINGS

Activity Description: Staff should treat community residents with respect and courtesy. Good presentations require adequate preparation of materials, prompt arrival at meetings, and proper attention to the concerns of residents. Residents should be made aware in advance of a meeting agenda and should receive follow up communication about progress toward project objectives.

Performance Criteria:

- * Meeting agenda or objectives shall be provided to community residents meeting with BRA officials;
- * Neighborhood advocates are to be treated with respect and courtesy;
- * Adequate notification to community residents of community meetings;
- * Meeting materials shall be prepared for community residents meeting with BRA officials.

Procedures:

NAME	ACTIVITY
Project Manager	Schedules meetings with community residents with emphasis on advance notification of the date, time, and location
	Makes a sincere effort to avoid cancellations; if a cancellation is necessary, meetings must be promptly rescheduled
	Makes adequate meeting materials available to meeting participants. An agenda should generally be prepared in advance and copied to the Assistant Director
Community Participation Team	Distributes a supply of community calendars to department staff in anticipation of community meetings

3) DEVELOPMENT OF PROJECT UPDATES

Activity Description: Briefing materials will be developed by staff in a manner that informs neighborhood residents and staff about planning and zoning activities. The first stage of developing project updates will be the completion of the NHD Project Directory.

Performance Criteria:

- * Listing of community residents or groups impacted by the project;
- * Outline of potential concerns of community residents.

Procedures:

NAME	ACTIVITY
Project Manager	Prepares project updates and briefing materials
Community Participation Team	Assists the project manager in developing project updates using Lotus Agenda

4) DEVELOPMENT OF A COMMUNITY MAILING LIST

Activity Description: A comprehensive listing of neighborhood leaders and organizations will be assembled and continually updated, according to neighborhood. Such a list is essential for the deployment of correspondence. Upon completion, such a list will be distributed to the department.

Performance Criteria:

- * NHD has a comprehensive, up-to-date listing of neighborhood organizations and residents concerned with development issues including addresses and phone numbers, available for use by department staff.

Procedures:

NAME	ACTIVITY
Community Participation Team	Determines categories for community listings distributed by the community participation coordinator and prepares listings using WordPerfect Mail Merge. Similar lists, being prepared by the Director's staff, will be used to mail the BRA newsletter mailing

5) COMMUNITY TRACKING

Activity Description: Lotus Agenda will be utilized to establish a directory of community leaders and community meetings. Upon completion, the directory will be accessed by the Assistant Director for greater community outreach. A sampling of community leaders in each neighborhood will be contacted weekly to determine the community's positions on BRA initiatives.

Performance Criteria:

- * Community leaders and organizations are contacted routinely to review development issues;
- * Positions of key neighborhood leaders on certain development issues are recorded for future reference.

Work Plan:

NAME	ACTIVITY	DATE
Thompson & Wilson	Agendize Roxbury mailing lists	April
	Agendize South End mailing lists	May/June
	Agendize Chinatown mailing list	May

6) ROXBURY NEWSLETTERS

Activity Description: To inform Roxbury community residents about BRA initiatives, a newsletter will be developed and distributed regularly to the community. Ideally, Roxbury residents will receive written correspondence concerning BRA activities at least bi-weekly.

Performance Criteria:

- * Roxbury community is well-informed about BRA activities, specifically NHD projects.

Procedures:

NAME	ACTIVITY
Community Participation Team	Produce BRA newsletter bi-weekly (overseen by William O'Donnell) and distribute city-wide
	Produce NHD Newsletter bi-weekly to keep neighborhood residents informed about special events or forums
	Produce special project updates as needed, especially for high profile projects such as Parcel to Parcel One

ROXBURY LISTINGS IN MAIL MERGE

The following listings are available in Mail Merge. In addition to including mailing information, they also include phone numbers.

1. GENERAL LISTINGS
 - A. ROXBURY COMMUNITY ADVOCATES
 - B. FEDERATION OF BLACK DIRECTORS
 - C. ROXBURY CHURCHES
2. ROXBURY DEVELOPMENT REVIEW GROUPS
 - A. ROXBURY NEIGHBORHOOD COUNCIL
 - B. ROXBURY PZAC (Planning & Zoning Advisory Committee)
 - C. SUB-PZAC'S (Planning & Zoning Advisory Committees)
 - D. ROXBURY NEIGHBORHOOD ASSOCIATIONS
3. ROXBURY MEDIA
4. ROXBURY DEVELOPERS
 - A. MINORITY DEVELOPERS (Includes the Minority Developers Association)
 - B. NON-PROFIT DEVELOPERS
5. DUDLEY AREA
 - A. DUDLEY MERCHANTS (Includes the Dudley Terminal Merchants Association)
 - B. DUDLEY PROPERTY OWNERS
 - C. DUDLEY STREET NEIGHBORHOOD INITIATIVE (Board of Directors)
6. SPECIAL PROJECT REVIEW COMMITTEES
 - A. PARCEL 18
 - 1) ADVISORY COMMITTEE FOR PARCEL TO PARCEL I
 - 2) PARCEL 18 LIST (Includes the Task Force & other advocates)
 - B. PARCEL P-3 PROJECT REVIEW COMMITTEE

IV. INTERDEPARTMENTAL AND INTERGOVERNMENTAL COORDINATION

A. POLICIES AND PROCEDURES

The objective of interdepartmental and intergovernmental coordination is for department staff to take advantage of the existing pool of resources within the BRA and government agencies associated with city planning and zoning. The accomplishment of such an objective will facilitate project management, clarify policy directives, and aid this NHD's ability to anticipate and accomplish special projects. An additional outcome of the coordination will be to clarify to other City and State agencies the role of the BRA and specifically the functions of NHD. To accomplish this objective, interdepartmental and intergovernmental coordination must function to:

- * Regularly inform department staff about project and policy developments via the department newsletter, the department calendar, and staff meetings;
- * Regularly contact other government agencies about department initiatives, specifically special events;
- * Provide effective reconnaissance to department staff of the initiatives of city, state and federal agencies;
- * Establish mechanisms to facilitate staff completion of information requests, including director's correspondence and critical responses.

Recently the Parcel to Parcel Linkage I and the Roxbury Economic Development Program are examples of an approach where members of other departments within the BRA share their work on the project. The purpose of interdepartmental meetings is not simply informative, but to review and outline assignments and responsibilities. Such meetings have enhanced the management of these projects.

The Director's office has ordered the creation of three committees to assist in the formation and implementation of certain policies. The following committees include: the Administrative Services Committee, to reviews space allocation; the Planning and Development Committee, which reviews issues relating to neighborhood development; and the Housing Committee, which will reviews the housing production pipeline.

Intergovernmental and interdepartmental mechanisms have been designed to facilitate the tasks of department staff. The programs have been designed to assist staff with project responsibilities as well as communicate and anticipate policy directives.

B. COMPONENTS

The following systems are described in greater detail in this section:

- 1) Critical Response Unit
- 2) Contact with the Mayor's and Director's Offices
- 3) Director's Office Correspondence
- 4) Special Projects

1) CRITICAL RESPONSE UNIT (CRU)

Activity Description: The CRU is the "wing" of NHD which responds to important requests from outside of the department for information or planning activities. The CRU provides much-needed operational assistance when time constraints dictate that a thorough, professional product must be produced in a limited amount of time. The goal of the CRU is to produce quality results while minimizing the extent to which these critical requests for information and services interfere with the department's ongoing activities.

Performance Criteria:

- * All department staff participate in the CRU;
- * The CRU is flexible, maximizing utilization of available staff and information resources to respond to a wide variety of requests;
- * Staff comments are incorporated into the operations of the CRU.

Procedures: The CRU is operating under the following general procedures.

- * The Assistant Director is responsible for deciding when the CRU should be used
- * Response Directors, usually Deputies, are assigned by the Assistant Director to oversee each response
- * NHD staff, except Deputies, are assigned in teams on a rotating basis. Staff are responsible for finding replacements when conflicts arise
- * Jon Layzer serves as overall Response Coordinator, responsible for keeping the responses running smoothly, preparing for the production of products, and resolving conflicts to allow for smooth overall operation
- * Mirdza Zeipe is not assigned to serve on the CRU on a rotating basis as her services are needed for nearly every response

NHD staff assignments to the Critical Response Unit are as follows:

April 17-21	Lewis	Thompson-McCall
April 24-28	McGilvray	Lucas
May 1-5	Zeigler	Burns
May 8-12	Smith	d'Amato
May 15-19	Torres	Noone
May 22-26	Faria	Johnston
May 29-June 2	Baker	Lynn

The staff assignment schedule will be repeated for the weeks following June 2nd.

2) CONTACT WITH MAYOR'S AND DIRECTOR'S OFFICES

Activity Description: The Assistant Director must maintain contact with the Mayor's and Director's offices in order to understand policy directives, anticipate special projects, and assign priorities to ongoing department projects. To address this need, a staff person will maintain contact with John Reardon (Mayor's Office of Neighborhood Services), Ralph Memolo (BRA/City), Beverly Johnson and Sheila O'Brien (Director's office) and prepare weekly briefings for the Assistant Director including issues, date, source, actions taken, staff, date due, and date completed.

Performance Criteria:

- * Assistant Director is well informed on issues of concern in the Director's and Mayor's offices.

Status: The Mayor's and the Director's office are contacted regularly and informed about NHD initiatives. To continue and enhance communication additional procedures will be developed and implemented.

Procedures:

NAME	ACTIVITY
Williams Wilson	Maintain ongoing contact with key people
Wilson	Prepare weekly briefing for Assistant Director
Wilson	Clarify staff assignments and monitor compliance

3) DIRECTOR'S OFFICE CORRESPONDENCE

Activity Description: Consistent, timely response to Director's office correspondence items improves the overall perception of the department and frees the Assistant Director and department staff from avoidable crises situations. To achieve this goal, tasks are assigned and responses reviewed. Staff compliance is monitored and bi-weekly briefings on progress are prepared for the Assistant Director.

Performance Criteria:

- * Director's Office correspondences are handled in a consistent, timely fashion.

Status: System is up and running efficiently. Further actions will be taken to ensure a timely and adequate response.

Procedures:

NAME	ACTIVITY
Williams DeJesus	Receive correspondence; direct to Lynn with instructions if needed
Lynn	Copy to assigned staff and to pending file, establish completion date
Lynn	Monitors compliance with completion date
Staff	Response to correspondence by letter, call, or other action. The response is noted or attached to correspondence form and package returned to Lynn
Williams	Assists with compliance if needed
Lynn	Forwards completed package to Prince in Director's office
Lynn	Prepare bi-weekly briefing for Assistant Director

4) SPECIAL PROJECTS

Activity Description: Neighborhood Housing and Development has been a lead department in responding to inquiries by community residents. Such inquiries often concern the disposition of BRA land or upkeep of BRA properties.

Consistent, timely responses to such requests improves the overall perception of the department and frees the Assistant Director and department staff from avoidable crisis situations. The special projects unit will be responsible for community inquiries. A response will often involve contact with Real Estate Services, the Director's office, and may at times require board action.

Performance Criteria:

- * The department responds to requests for information and services in a thorough, professional manner;
- * Identifies repeated types of special projects and defines procedures to respond;
- * Meets with concerned parties as necessary to resolve pending issues concerning the project;
- * Maintains an accurate record of each response.

Procedures:

NAME	ACTIVITY
Assistant Director	Special projects channeled to Major Lewis
Major Lewis	Manages and/or keeps track of special projects. Routinely updates the Assistant Director and concerned staff on related issues

V. MANAGEMENT INFORMATION SYSTEMS

A. POLICIES AND PROCEDURES

The highest priority in the development of NHD management information systems is improving the quality of information provided to the BRA Board, members of the Director's Office staff, and community residents. Internal management of NHD project and staff also rely heavily on accurate, up-to-date information on the department's varied projects and activities. To address these needs, NHD management information systems must:

- * Integrate existing under-utilized sources, such as database files, project summary sheets, and project narratives;
- * Provide periodic briefing packages for the Assistant Director and Deputy Directors with active participation by and input from department staff; and
- * Develop better displays of data provided in summary form and produce more comprehensive reports of publishable quality using newly-available computer hardware and software.

In the past several months, NHD has dramatically improved the accessibility of computers to interested staff. Many members of the staff with little or no prior computer experience are learning to use the machines to draft memos, type up meeting agendas and notes, or perform financial calculations. For those without a computer at their desk, a common computer is set up near the coffee machine. A laser printer, capable of printing publishable quality graphics and letter quality text, is located in the secretaries' area and will eventually be hooked up to the common computer.

With improved staff computer-literacy, and improved computer hardware, the department can finally implement a comprehensive set of management information systems which tie together existing information resources and provides great flexibility in displaying and reporting project information. NHD management information systems will satisfy many of the department's information needs while minimizing the extent to which necessary information requests interfere with other priority activities.

B. COMPONENTS

The department's Project Directory is the central element in NHD's management information systems. Other information systems listed below serve as "satellite" information resources, feeding information into the Project Directory. The following management information systems are described in greater detail in this section:

- 1) NHD Project Directory
- 2) Time Management
- 3) Central Files
- 4) Project Critical Path Tracking
- 5) Project Briefing Packages and Project Fact Sheets
- 6) Public Subsidy Briefing

1) NHD PROJECT DIRECTORY

Activity Description: The NHD Project Directory is the central repository for brief, relevant information regarding the department's projects and activities. The foundation of the Project Directory is an accurate listing of active NHD projects which serves as an index to the department's Central Files, a reference/briefing guide to projects and staff assignments, and a framework for updating the Time Management catalogue. In addition to basic information such as staff assignments, project overview and status, the Project Directory stores information relating to important project events including BRA Board actions and critical path chart milestones. The Project Directory will also be used to log NHD Board Action Fact Sheets so that standard project fact sheets can be produced quickly and easily.

Performance Criteria:

- * Basic project information is accessible to NHD staff.

Status: The Project Directory was implemented on Lotus Agenda, a new software which allows for the flexible management of text-based information. Recently, department staff (Andrea d'Amato, Mark Johnston, and Aaron Schleiffer) were assigned to work on the Project Directory. Other department members are encouraged to learn Lotus Agenda and to use the Project Directory which will rely on active staff participation to succeed.

Work Plan:

NAME	ACTIVITY	DATE
Layzer	Draft Project Directory circulated to staff	4/3/89
Layzer d'Amato Schleiffer Johnston & Others	Schedule Agenda training sessions for groups and one-on-one; training sessions focus on basic Agenda skills and tasks for maintaining and printing the Project Directory sections	4/89
Layzer Lynn Fong	Schedule training session to establish a view for upcoming NHD Board actions and the housing pipeline	4/89
Layzer Smith	Schedule training session to establish a view for monitoring fair housing compliance	4/89
Layzer & Others	Final Spring '89 Project Directory circulated to staff	4/28/89

2) TIME MANAGEMENT

Activity Description: To facilitate better tracking of projects and staff assignments, NHD staff are modifying the existing Time Management listing to more accurately describe the department's activities. NHD has also adopted new procedures for using the Time Management system to encourage active use of this important management information resource.

Status: NHD staff met with Ken Fields (Management and Budget) to discuss extensive changes to the Time Management listing of NHD projects. The role of NHD's Deputy Directors and other staff in supervisory positions has been expanded to include a "checkpoint" in the sign-off of weekly staff timesheets as follows (staff with name underlined and in capital letters initial timesheets of staff below before forwarding to the Assistant Director for signature):

WILLIAMS
McGilvray
Smith
Wilson
d'Amato

O'MALLEY
Faria
Noone
Johnston

LYNN
Layzer
Zeipe
Thompson-McCall
deJesus
Lewis

DONNELLY
Zeigler
Baker

FONG
Burns
Lucas
Torres

deJESUS
Rice
Owens

Work Plan:

NAME	ACTIVITY	DATE
Lynn	Make final "Priority" assignments for new projects to be listed and return to Ken Fields	4/3/89
Ken Fields	Produce revised Time Management project listing	Est. 4/89
Lynn Layzer	Revised Time Management listing distributed to NHD staff with list of projects in other department to which NHD staff charge time	4/28/89

3) CENTRAL FILES

Activity Description: NHD has central files in the secretaries' area. The filing cabinets contain files for all active NHD projects -- the same projects described in the NHD Project Directory. An index to the central files will be placed on the outside of the filing cabinets for easy reference. Development projects have files for each of the following categories:

- * Project Summary Information;
- * Zoning/Impact/Approvals Information;
- * Design/Architectural/Engineering Information;
- * Community Process and Community Benefits;
- * Financial Information;
- * Developer Correspondence; and
- * Disposition/BRA Agreements/Legal.

The NHD central files guarantee the reliable accessibility of critical project information. The files also provide a "first place to look" for all project information, minimizing the extent to which requests for information from within and outside the department interfere with ongoing activities.

Performance Criteria:

- * Important project information and documents are stored in a central location and are accessible to department staff.

Status: The NHD central files are in place corresponding to the latest draft of the NHD Project Directory. Department staff have been assigned to help sort old files into materials for new files and materials to be stored (Dave Baker, Maria Faria, Aaron Schleiffer). Marta deJesus and Jeannie Lynn are coordinating staff efforts to complete the final steps in implementation of the central files.

Work Plan:

NAME	ACTIVITY	DATE
deJesus	Distribute old files to designated staff for sorting; keep track of files given out and due dates	4/89
deJesus Owens Rice	Daily filing of materials	Ongoing

4) PROJECT CRITICAL PATH TRACKING

Activity Description: Charts marking the progress of BRA disposition developments managed by NHD staff are circulated to project managers for updates each month. The charts feed information into the department's Project Directory to provide an overview of each project and to allow department staff to forecast upcoming critical dates. Copies of the charts are kept in the Central Files to be used as examples for future projects and to estimate project schedules. Deputy Directors use the charts to monitor and supervise project and staff progress.

A large, wall-sized chart has been mounted in the Assistant Director's office to provide an overview of all of the department's disposition projects. Project Critical Path Charts help department staff to anticipate project Board actions and produce simple status update information. The charts also improve NHD project managers' ability to access information and comply with deadlines and serve as an instructive model for new project managers.

Performance Criteria:

- * Project managers focus on project's future milestones, allowing the department to anticipate board actions and better handle requests for services.

Status: The 9"x14" critical path charts are circulated each month to project managers. Each manager is asked to review information relating to the critical path of BRA land disposition projects they are responsible for. Project managers have approximately a week to return the revised critical path charts.

The Assistant Director's wall chart has the critical paths of the disposition development projects; critical dates are noted, with estimated dates identified as "Est.", and completed critical steps are checked off. The chart is filled in with China Markers, which can be erased easily with a (dry) tissue.

Procedures:

After all of the critical path charts are returned, review the critical path charts and identify any conflicting information, either between charts or with recent BRA Board Agenda. To update the critical path charts:

- * Review each project and identify conflicting information. Make sure all estimated dates are in the future, review the BRA Board Agenda from the last two months and make sure that all relevant NHD Board Actions are reflected on the charts
- * Resolve any conflicts with Project Managers
- * Redraw (or type) the critical path charts with updated information

To update the Assistant Director's wall chart:

- * Start at the top of the chart. For each project, locate the paper (9"x14") critical path chart by the project manager, noted under the project name on the wall chart. Check and make revisions as necessary to make sure that any new or revised information from the paper copy is reflected on the wall chart
- * If a project has received Final Designation since the last revision, re-write the project in the top half of the wall-chart and erase the project as listed under Tentative Designations
- * When you are done, sign your initials and the date in the upper right hand corner of the chart in the space labelled "Updated by: "

5) PRIORITY PROJECT BRIEFING PACKAGES AND PROJECT FACT SHEETS

Activity Description: Department staff regularly produce briefing packages, status reports, and fact sheets describing active NHD projects. As part of the effort to build and strengthen the NHD Project Directory, relevant project information from these information resources will be entered into the directory, providing a central location for key project information and simplifying the process of compiling project information in the future.

The NHD Quarterly Report provides valuable information about the department's mission and priorities, as well as specific status information and performance criteria for important department activities. In addition, detailed Project Briefing Packages for NHD priority project are produced from time to time for the Director. These two important sources of information will be made accessible to department staff through the central files, where staff will be able to find the documents to make their own copies if interested, and through the Project Directory, where information from the Quarterly Report and Project Briefing Packages will be logged in summary form.

Also, as part of the NHD Board process, project managers produce Fact Sheets for all projects requesting Board Actions. As with the Quarterly Report and Project Briefing Packages, these Fact Sheets provide an invaluable resource of basic project information. Project Fact Sheets will be included in central files. In addition, project managers are encouraged to log Project Fact Sheets onto the NHD Project Directory, minimizing the time and effort required to reproduce or revise the Fact Sheets.

Status: The NHD Quarterly Report on priority projects and activities is being revised for publication and will be circulated to department staff. Project Briefing Packages which have already been produced are being identified, collected, and filed in central files. The NHD Project Directory will include a listing of Project Briefing Packages available in the central files, and relevant information from these information resources will be logged in the Project Directory.

Project Fact Sheets are currently produced for all NHD projects requiring BRA Board action. Fact sheets are also produced for all housing developments in the Housing Production Pipeline report. A work plan for logging and printing project fact sheets will be developed by Jon Layzer in May 1989.

6) PUBLIC SUBSIDY BRIEFING

Activity Description: The reduction of state and federal housing subsidy funds has increased the level of difficulty in our efforts to produce affordable housing. Judicious use of existing funds is critical to the successful achievement of our mission. It is even more essential now to coordinate our efforts to maintain the BRA's access to these funds.

Performance Criteria:

- * NHD staff maintain up-to-date records on available subsidy programs and BRA development projects seeking the subsidies;
- * Information is accessible to housing project managers who need this information;
- * New project managers can train themselves more easily by taking advantage of the public subsidy briefing resources.

Status: To guarantee a higher level of coordination within the department, Ron Fong has assigned NHD housing project managers to assume the responsibilities of program management for the most readily available and commonly used housing subsidy programs. Staff assignments are as follows:

SHARP, Tax Credits	Laura Burns
Section 8, Chapter 707, MIFA	Wendy Lucas
Linkage	Ron Fong
RHDAL, HIF	John Noone
HOP, Chapter 705	Ron Fong

Although there are several other housing subsidy programs in existence, these programs tend to be poorly funded or are created for very specific clients; project managers are encouraged to make use of these special subsidy programs if the programs are applicable to their specific projects. Project managers should also be aware that a relatively complete handbook of information on the subsidy programs has been put together by Ron Fong. Ron also keeps more extensive records on the subsidies in his filing cabinet and is more than willing to share this information.

Procedures:

Project managers' responsibilities as public subsidy program managers include attendance at appropriate meetings that address specific programs and notification of NHD staff of availability of funds and programmatic changes. Jon Layzer will provide overall technical assistance. Ron Fong is responsible for overall management of the public subsidy briefing effort.

INDEX TO THE NHD CENTRAL FILES AND PROJECT DIRECTORY

- I. SOUTH END DISPOSITION HOUSING
- II. NEIGHBORHOOD DISPOSITION HOUSING (NON-SOUTH END)
- III. ECONOMIC DEVELOPMENT/DISPOSITION
- IV. CAPITAL IMPROVEMENT PROJECTS
- V. BOARD OF APPEALS HOUSING (NON-DISPOSITION)
- VI. NEIGHBORHOOD PLANNING INITIATIVES
- VII. SPECIAL PROJECTS

I. SOUTH END DISPOSITION HOUSING

Coordinated by Tom O'Malley, Director for South End Planning and Development. Disposition housing developments in the South End neighborhood include disposition developments pre-dating the South End Neighborhood Housing Initiative (SENHI), SENHI Fast Track and Phase I developments, and the Parcel to Parcel 2/Helen Morton Center project.

Project Name

Project Manager

1134 Washington Street	* John Noone
1154 Washington Street	* Bob McGilvray
255-293 Northampton Street/Parcel RC-7	* Maria Faria
406-408 Harrison Avenue	* Bob McGilvray
45 Thorndike Street	* Maria Faria
47 Thorndike Street	* Maria Faria
611 Tremont Street	* Maria Faria
Parcel to Parcel 2/Helen Morton Center	* Antonio Torres
TDC III/395,397,400 Massachusetts Ave.	* Maria Faria
Tent City Phase II	* John Noone

SENHI Phase I:

75 East Berkeley Street/TDC IV	* Bob McGilvray
Allen House/1682 Washington Street	* Tom O'Malley
Porter House/1724-1726 Washington St.	* Tom O'Malley
Lodging House/1734-1740 Washington St.	* John Noone
Roxbury Corners/ Parcel 29A and 1777-89 Washington	* Maria Faria
640 Tremont Street/IBA	* Tom O'Malley
6-14 East Concord Street/Old Boston	* Maria Faria
Langham Court	* John Noone
Parmalee Court	* Laura Burns

II. NEIGHBORHOOD DISPOSITION HOUSING (NON-SOUTH END)

Coordinated by Ron Fong, Deputy Director for Affordable Housing Production. Disposition housing developments in Boston's neighborhoods not including the South End, the Waterfront (Harbor Planning Department), and Downtown (Urban Design and Development Department). Includes disposition developments in the following neighborhoods: Charlestown, Chinatown/South Cove, East Boston, Hyde Park, Jamaica Plain, Roslindale, and Roxbury.

Project Name

Project Manager

CHARLESTOWN DISPONSITION HOUSING

Charlestown Parcel P-2	* Wendy Lucas
Charlestown Parcel R-87	* Wendy Lucas
Charlestown Parcel R-87A	* Wendy Lucas
Charlestown Parcel R-96	* (Bob Rush)
Charlestown Parcel R-107	* (Bob Rush)

CHINATOWN/SOUTH COVE DISPOSITION HOUSING

Waterford Place/180 Shawmut Avenue	* Ron Fong
Chinatown Parcel A	* Ron Fong
Chinatown Parcel B	* Ron Fong
Don Bosco (South Cove P-12)	* Ron Fong

EAST BOSTON DISPOSITION HOUSING

East Boston Parcels EB-23, 24	* Laura Burns
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HYDE PARK DISPOSITION HOUSING

Parcel SWC-4	* Phil Zeigler
Parcel SWC-5	* Phil Zeigler
Parcel SWC-6	* Phil Zeigler

JAMAICA PLAIN DISPOSITION HOUSING

113-117 Lamartine St.	* Ron Fong
Mission Hill NHS	* John Noone

ROSLINDALE DISPOSITION HOUSING

Parcel SWC-1	* Phil Zeigler
Parcel SWC-2	* John Noone
Parcel SWC-3	* Phil Zeigler

II. NEIGHBORHOOD DISPOSITION HOUSING (NON-SOUTH END) (p.2)

Project Name

Project Manager

ROXBURY DISPOSITION HOUSING

14-20 Linwood Street	* Wendy Lucas
32 Dale Street	* Laura Burns
63 Highland Street	* Bob McGilvray
Bartlett Court	* Antonio Torres
C.A.B.	* Laura Burns
Conkling/Garrison-Trotter Phase I	* Laura Burns
Douglass Plaza Phase I	* Laura Burns
Douglass Plaza Phase II	* Laura Burns
Fountain Hill Phase I	* Laura Burns
Fountain Hill Phases II&III	* Laura Burns
Garrison-Trotter Phase II	* Laura Burns
Infill	* Tom O'Malley
Marcella Street Townhouses	* Maria Faria
St. James Estates	* Laura Burns
Washington Park Parcel J5-B	* Laura Burns
Washington Park Parcels F3a, 3b	* Ron Fong
Winslow Court Phase I	* Ron Fong
Winslow Court Phase II	* Ron Fong

III. ECONOMIC DEVELOPMENT/DISPOSITION

Coordinated by Owen Donnelly, Deputy Director for Neighborhood Economic Development. Includes commercial, institutional, mixed-use and other non-housing developments on BRA disposition parcels. Parcel to Parcel Project 1, the development of Kingston/Bedford and Parcel 18 is not listed in this section. For detailed information on this important economic development project, see the Special Projects section.

Project Name

Project Manager

CHINATOWN/SOUTH ECONOMIC DEVELOPMENT/DISPOSITION

237 Harrison Avenue	* (Aaron Schleiffer)
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SOUTH END ECONOMIC DEVELOPMENT/DISPOSITION

19 Clarendon/Boston Ballet/BCA	* Bob McGilvray
411 Harrison Avenue/Adams Transmission	* Bob McGilvray
421-435 Harrison Avenue/Parcel SE-120	* Bob McGilvray
851 Albany/Parcel X-40/Gold Key	* Bob McGilvray
Massachusetts Square	* Maria Faria
Stride Rite/Cibotti/Parcels 41-D,E	* Maria Faria

ROXBURY ECONOMIC DEVELOPMENT/DISPOSITION

22-26 Warren Street	* Bob McGilvray
95 Dudley Street	* Bob McGilvray
Campus High Parcel R-14	* (Muhammad Abdus-Sabur)
Campus High Parcel P-3/NCAAA	* Phil Zeigler
Campus High Parcel P-2C/Post Office	* Owen Donnelly Parcel
Roxbury Heritage State Park	* Joan Smith
SMILE Preschool/Parcel H-6b	* Laura Burns
Washington Park Parcel F-6 (Grove Hall)	* Dave Baker

IV. CAPITAL IMPROVEMENT PROJECTS

Coordinated by David Baker under the guidance of Owen Donnelly, Deputy Director for Neighborhood Economic Development. Includes active Capital Improvement project in which NHD staff members are involved, focusing on the South Cove/Chinatown, South End and Roxbury neighborhoods.

Project Name

Project Manager

CHINATOWN/SOUTH COVE CAPITAL IMPROVEMENTS

Chinatown Gateway

* David Baker

SOUTH END CAPITAL IMPROVEMENTS

Contract J-2/Montgomery & Pembroke

* Maria Faria

Contract E-2/Dartmouth Place

* Maria Faria

Contract G-2/Tent City

* John Noone

West Canton Street

* Maria Faria

Monsignor Lally Park

* Maria Faria

Hayes Park

* Maria Faria

Worcester Square Park

* Maria Faria

Shawmut Avenue Phase I

* Maria Faria

ROXBURY CAPITAL IMPROVEMENTS

Fountain Hill Square Phase I

* David Baker

New Dudley Street Phase II

* David Baker

John Eliot Square

* David Baker

Parcel P-3/NCAAA

* Phil Zeigler

Cedar Square Park

* Dave Baker

Garrison Trotter Way

* Laura Burns

Douglass Plaza

* Laura Burns

V. BOARD OF APPEALS HOUSING (NON-DISPOSITION)

NHD is responsible for managing non-disposition housing developments of 20 units and more through the Zoning Board of Appeals and Design Review processes. An important component is negotiating the voluntary inclusion of affordable housing units or contributions to nearby affordable housing developments. Antonio Torres is responsible for the majority of these projects.

Project Name

Project Manager

BACK BAY/FENWAY BOARD OF APPEALS

9-11 Harcourt Street
108 Kilmarnock Street

* Antonio Torres
* Antonio Torres

BRIGHTON BOARD OF APPEALS

15 North Beacon/Union Square
North Beacon Street/St. Joseph's

* Antonio Torres
* Antonio Torres

CHINATOWN/SOUTH COVE BOARD OF APPEALS

73-79 Essex Street

* Ron Fong

DORCHESTER BOARD OF APPEALS

65 Bay Street
21-35 Coleman Street
336 Adams Street
Baker Square
Fabreeka Mills

* Antonio Torres
* Jon Layzer
* Antonio Torres
* Antonio Torres
* Antonio Torres

EAST BOSTON BOARD OF APPEALS

Clippership Wharf
Gumball Factory/120-150 Orleans

* Pam Wessling
* Antonio Torres

HYDE PARK BOARD OF APPEALS

Clarendon Court

* Antonio Torres

JAMAICA PLAIN BOARD OF APPEALS

200 Allandale Road
Allandale Glen
56-65 Brookside Avenue/Stonybrook
Lotus Street

* Antonio Torres
* Nancy Tentindo (UDD)
* Antonio Torres
* Antonio Torres

NORTH END BOARD OF APPEALS

86-106 Fulton St./Fulton Place

* Peter Dreier

V. BOARD OF APPEALS HOUSING (NON-DISPOSITION) (p.2)

Project Name

Project Manager

ROSLINDALE BOARD OF APPEALS

Cliffmont/Grew
High Point Village
30-40 Weld Street

* Antonio Torres
* Antonio Torres
* Antonio Torres

SOUTH BOSTON BOARD OF APPEALS

540 East Broadway Street
The Foundry
125-138 Tudor Street

* Antonio Torres
* Antonio Torres
* Antonio Torres

SOUTH END BOARD OF APPEALS

Deacon Court

* Antonio Torres

WEST ROXBURY BOARD OF APPEALS

Chestnut Park Condominiums
Hancock Woods
Newfield Woods

* Antonio Torres
* Antonio Torres
* Antonio Torres

VI. MAJOR PLANNING INITIATIVES

NHD's major planning initiatives are organized by community.

Project Name

Project Manager

CHINATOWN PLANNING

Chinatown Masterplan	* (Ting Foo Yeh)
CHIP Phases II and III	* Ron Fong
One Lincoln Street (Kingston/Bedford)	* Williams/(Wessling)

SOUTH END PLANNING

South End Development Policy Plan	* Tom O'Malley
SENHI Phase II	* Tom O'Malley

ROXBURY PLANNING

Parcel P-3/NCAAA Planning:

Campus High Parcel P-3	* Phil Zeigler
Other NCAAA planned developments	* Phil Zeigler

Dudley Square Area Development:

Ruggles Center (Parcel 18)	* Williams/(Wessling)
Parcels 9 & 10 (MBTA)	* Owen Donnelly
Parcels SR-14, P-3A	* Owen Donnelly
Blair Site	* Owen Donnelly

Economic Development Planning:

Dudley Square Business District	* Owen Donnelly
Roxbury Corporation	* Andrea d'Amato
Enterprise Zones	* Andrea d'Amato
Dudley Street Neighborhood Initiative	* Andrea D'Amato

Consultant Contracts:

Stull & Lee
Dixon

VII. SPECIAL PROJECTS

A wide variety of ongoing, planning and research, special disposition and development projects related to affordable housing and neighborhood economic development, including major management programs and services.

Project Name

Project Manager

NHD COMMUNITY PROCESS

Chinatown Community Process	* Josie Thompson-McCall
South End Community Process	* Mark Johnston
Roxbury Community Process	* Josie Thompson-McCall
Harbor Point	* Josie Thompson-McCall
Community Calendar	* Laval Wilson

INTERDEPARTMENTAL/INTERGOVERNMENTAL PROCESS

BRA Board Process	* Jeannie Lynn
Briefing Packages/Status Updates	* Jeannie Lynn
Director's Correspondence	* Jeannie Lynn
Critical Response Unit	* Jon Layzer
Requests for Information	* Jon Layzer
Intergovernmental Agency Contacts	* Marta DeJesus
Notices of Acquisition/Other Agencies	* Marta DeJesus
Administrative Services Committee (ASC)	* Anthony Williams
Planning and Development Committee (PDC)	* Anthony Williams
Housing Production Committee (HPC)	* Ron Fong

FAIR HOUSING AND MARKETING

Fair Housing policy	* Joan Smith
Fair Housing project compliance	* Joan Smith

NHD ENGINEERING AND DESIGN

South End Engineering and Design	* Mirdza Zeipe
Roxbury Engineering and Design	* Mirdza Zeipe

BUSINESS RELOCATION

	* Major Lewis
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PUBLIC SUBSIDY BRIEFING/PIPELINE

Low-income Housing Tax Credits	* Ron Fong
SHARP	* Laura Burns
Section 8	* Laura Burns
Chapter 707	* Wendy Lucas
Chapter 705	* Wendy Lucas
MIFA	* Ron Fong
RHDAL	* Wendy Lucas
HIF	* John Noone
HOP	* John Noone
	* Ron Fong

VII. SPECIAL PROJECTS (p.2)

Project Name

Project Manager

LEASED PROPERTIES

Church of the Good Shepherd
Church of the Untd Comnty/116 Roxbury
Whittier Street Health Center

* Phil Zeigler
* Bob McGilvray
* Phil Zeigler

DISPOSITION SPECIAL PROJECTS

* Bob McGilvray

185 State Street
Parcel EB A-2/Cunard Lot
557 Tremont Street/St. Cloud
165 West Springfield Street
57 East Concord Street

* John Noone
* Antonio Torres
* Bob McGilvray
* Maria Faria
* Bob McGilvray

GENERAL REHABILITATION (NON-DISP)

* Bob McGilvray

Women for Comnty Service/558 Mass. Ave.
Charlestown Working Theater Rehab
Hale House Rehabilitation

* Bob McGilvray
* Bob McGilvray
* Jon Layzer

OTHER SPECIAL PROJECTS

Audobon Circle
Castle Square
Montessori Preschool
Westminster-Willard/Mandella

* Laura Burns
* John Noone
* Laura Burns
* Tom O'Malley

MANAGEMENT AND ADMINISTRATION

Interviews/Hiring
Assistant Director's Scheduling
Secretarial Services

* Jeannie Lynn
* Marta DeJesus
* Marta DeJesus
* Delores Rice
* Margaret Owens
* Laval Wilson
* Laval Wilson
* Jon Layzer
* Jon Layzer
* Jeannie Lynn

Seminars
Training
Management Information Systems
Critical Path Chart Tracking
Time Management

PROJECT MANAGEMENT CRITICAL PATH CHART

ROUND VI

Completed by: JOHN NOON
Date:

Project Name/ Line Management Number	BA Board Authorisation to advertise RFP	Date	RFP advertised/ Central Register	Date	Preloads due	BPC screening	Community meeting(s)	BA Board Intersective Designation	BA Board Approval	BA Board Approval	Design Development approval	Agreement/Dissemination price established	Working Drawings/ Contract Doc. & approval	Drawt. ENCEP (Bosdon Resubmittals...)	Drawt. APP (Affirmative Fair...)	Check Final Design/ Contract taking	LDA/Board Finalised	Approval approved	Conveyance/Drawings	Building Permits Issued (120)	Date Construction Start	Completion (120)	Check Completion of Construction (120)	Check Completion of Construction (120)	Check Completion of Construction (120)
SENHI LANGHAM COURT	✓	✓	✓	✓	✓	✓	✓	10/8/88	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	6/89	✓	✓	✓	
SENHI LODGING HOUSE	✓	✓	✓	✓	✓	✓	✓	4/8/89	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	5/89	✓	✓	✓	
PARCEL SNC - 2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	5/89	✓	✓	✓	
MISSION HILL NHS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	5/89	✓	✓	✓	
TENT CITY PHASE II	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	4/89	✓	✓	✓	

* COMPLETED: 1134 WASHINGTON STREET (AMMEND LDA SPRING '89 → O'MALLEY) (COC 12/188)

NEW YORK'S
CITY/UDA (COC 2/189)

VI. PERSONNEL

A. POLICIES AND PROCEDURES

Many personnel procedures are established within the BRA, but are not available at this time in a reference manual. Therefore, questions occasionally arise that require clarification of policies. To minimize confusion, NHD has attempted to identify personnel systems that exist, and in some cases, have assigned more detailed procedures at the department level.

In particular, the procedures used by the secretarial support staff need to be identified so that staff will understand the processes involved and cooperate with them. This will simplify training and orientation for secretarial staff in the future.

The effort to clearly identify procedures is consistent with NHD's overall management objective of improved communication. This information will be accessible to staff so that expectations are clear, eliminating the need for guesswork. This section will act primarily as reference tool for current staff and secondarily as a training tool for new staff.

B. COMPONENTS

The set of procedures identified in this section is a small sampling of the complex set of personnel procedures that affect staff. In the future we hope to identify and expand on other personnel procedures that currently exist at the BRA. The procedures identified in this section are:

- 1) Training Programs and Seminars
- 2) Hiring Process
- 3) Promotion/Recruitment
- 4) Attendance
- 5) Evaluation and Review Systems
- 6) Secretarial procedures

1) TRAINING PROGRAMS & SEMINARS

Activity Description: Opportunities will be created to ensure that staff operates as a group of highly skilled and motivated professionals; and function as a group, well versed in all relevant policies, financing tools, and programs. Routine communication will increase the staff's awareness of the BRA's initiatives.

Performance Criteria:

- * Individuals' training needs determined by the Deputies through staff evaluations and weekly review of Time Management forms;
- * Seminars/in-house training directed towards interested parties to provide insight on special projects (e.g., Central Artery and Linkage);
- * Conference and training session information received and posted on the department bulletin board. Written summaries prepared by attendees filed for future use by interested staff.

Status: Interested staff members have and will continue to receive training with NHD computer systems, including Word Perfect, Agenda, and D-Base. NHD staff meetings have included presentations on relevant topics including, the Central Artery project and deployment of Linkage. Upcoming presentations will include topics such as public subsidy programs and underwriting affordable housing.

2) HIRING PROCESS

Activity Description: A major NHD management priority has been to establish and implement a hiring process for NHD. By adding specific directives to the existing BRA system, a clear step by step procedure has been implemented to standardize this system. The NHD hiring process will minimize confusion and establish a better tracking system.

Performance Criteria:

- * Tracking of all applicants reviewed by our department;
- * Avoid confusion and applicants "Getting lost" and not being notified appropriately;
- * Job Vacancy Postings accurately reflect department needs;
- * All internal applicants and qualified external applicants are considered;
- * Provide a fair process for reviewing applicants;
- * Involving Deputies in the hiring process.

Status: The NHD policy was established by incorporating the existing BRA policy with more specific directives for our department. This department-wide policy was approved by the Assistant Director. Jeannie Lynn is responsible for implementing this process.

Procedures:

NAME	ACTIVITY
Williams	Request personnel need
Lynn	Draft JVP Request
Williams & Deputies	Review draft
Williams & Lynn	Obtain Grace's signature on JVP Request
Lynn	Send request to Bernice McLennan
McLennan	Approval by Human Resources and Management and Budget
McLennan	JVP posted in 3 BRA locations, copied to Williams

Procedures (continued):

NAME	ACTIVITY
Deputies & Lynn	Initial screening of applicants
Williams	Final screening of applicants
Williams & Lynn	Recommend candidate to Bernice McLennan (Interviews cease)
McLennan	Salary comparisons are made to establish offered salary
Williams & McLennan	Agree on salary to offer to candidate
McLennan	Notifies external candidate of offer by letter
Williams	Verbally notifies internal candidates of offer
BRA Board	Board approves candidate
Lynn & McLennan	Unsuccessful applicants notified by letter

3) PROMOTION/RECRUITMENT

Activity Description: Maintenance of a professional and efficient department staff remains a high priority. Promotion of staff will continue as positions become available and appropriate qualifications are demonstrated. Interested individuals (From inside and outside the BRA) will be promptly notified as positions become available.

Performance Criteria:

- * Applicant information is organized and accessible;
- * Staff aware of new postings and department objectives;
- * Current postings filled with qualified persons;
- * Additional positions cleared and posted;
- * Continual contact maintained with Human Resource department;
- * Interviews held on an ongoing basis to continue "Pooling" of qualified applicants.

Status: Housing Analyst/Planner and Project Manager postings are filled; Economic Development Assistant, Legal Counsel, and Financial Analyst postings are pending review due to the freeze on hiring. Four department interns are in place. Organizing applicant information with Agenda software is 95% complete (Two views established).

Procedures:

NAME	ACTIVITY
Lynn	Continual updating of applicant information with Agenda software
Lynn	Ongoing contact with Human Resources and qualified applicants
Williams & Lynn	Continual reassessment of department personnel needs

4) ATTENDANCE

Activity Description: This section clearly identifies department expectations in the area of attendance to ensure that information regarding absences is relayed to staff.

Performance Criteria:

- * Staff calls appropriate supervisor before (If possible) the start of the work day; generally a reason for the absence is given;
- * Staff calls in daily unless there is good reason to anticipate an extended absence;
- * Supervisor relays the information to other staff and records the absence on the department calendar;
- * Absent staff notifies other persons to cancel meetings, reassign work, etc., as necessary;
- * Staff completes Application for Leave form at least two weeks in advance; records on department calendar.

Status: A memo outlining the policy on attendance was distributed on February 27, 1989 and was discussed at a department staff meeting.

Procedures:

NAME	ACTIVITY
Staff	Calls in daily when attendance is due to illness
Supervisor	Notifies other staff and records on department calendar
Staff	If absent 5 or more days, provides a physician's note
Supervisor	Sends original note to Human Resource; copies to department personnel file
Supervisor	Reviews and initials weekly Time Management sheets
Supervisor	Makes any necessary adjustments to TM sheets; verbally advises staff before processing

5) EVALUATION & REVIEW SYSTEM

Activity Description: The purpose of an evaluation and review system is to ensure accountability, enhance communication among staff, and provide staff with a means to mark their performance. This system will allow an employee to clearly identify their needs and to develop and improve skills. This evaluation system is confidential and is to be regarded as a two-way street: not only is the employee's performance open for discussion but the Department's activities and supervisor's activities can be constructively criticized. The evaluation and review system also provides an opportunity for employees to play constructive role in changing the way the department is managed.

Procedures:

- * Employee performs a "Self Evaluation"
- * Supervisor and employee complete the Evaluation Summary forms and meet individually
- * Evaluation procedures provide a basis for discussion of the staff's performance
- * Evaluation forms are used to augment assessment of training needs and department records

Status: Interview forms, previously used by Human Resources to develop accurate job descriptions, have been distributed and will be collected shortly. The system is developed and Evaluation Summary forms have been revised to fit the department's needs as well as the overall BRA system (See attached forms).

Work Plan:

NAME	ACTIVITY	DATE
Lynn	Distribute interview forms	4/11/89
Lynn	Collect new/updated interview forms	4/18/89
Williams	Introduces Self-Evaluation form at staff meeting	4/26/89
Lynn	Distribute evaluation forms with instructions	5/02/89
Staff	Supervisors and employees meet to discuss Evaluations	May
Lynn	Store evaluation forms in dept. personnel files	5/24/89

SELF EVALUATION FORM

NAME: (Printed) _____

DATE: _____

JOB TITLE: _____

Purpose: To provide a history of development and progress and a basis for achieving goals.

Instructions: A number of traits, abilities and characteristics that are important for success are described in the contents of this appraisal. Please evaluate yourself using the scale described below.

Scale: 1 - Unsatisfactory
2 - Below Average
3 - Average
4 - Above Average
5 - Outstanding

SCALE

1. **ATTENDANCE** is faithfulness in coming to work daily and conforming to work hours. Are you punctual, dependable and give reasonable notification of absence or being late? _____
2. **PERSONAL APPEARANCE** is the personal impression an individual makes on others. Are you conscious of cleanliness and do you dress suitably for the job? _____
3. **PERSONALITY** is an individual's behavioral characteristics. Do you create a favorable impression? _____
4. **COURTESY** is the polite attention an individual gives other people. Are you tactful, willing to help, agreeable and pleasant when dealing with others? _____
5. **JOB KNOWLEDGE** is the information concerning work duties which an individual must know for a satisfactory job performance. How well do you know your work and related phases of your work and how well do you apply this knowledge in overcoming obstacles in the performance of duties? _____
6. **ACCURACY** is the correctness of work duties performed. Are you exact and precise requiring little supervision? _____

7. **ALERTNESS** is the ability to grasp instructions and to meet changing conditions. Are you attentive to instructions and usually quick to understand and learn? _____
8. **CREATIVITY** is talent for having new ideas and for finding new and better ways of doing things. Do you seek and suggest new and better ways of doing things? _____
9. **JUDGEMENT** is the ability to perceive and distinguish relationships or alternatives and the capacity to make reasonable decisions. Do you make selections and decisions using sound reasoning, timing, and tact after analyzing other possible alternatives? _____
10. **INITIATIVE** is the ability to begin or follow through with a plan. Are you a self-starter, seeking additional work when workload is light, and pushing to complete a job? _____
11. **RESPONSIBILITY** is the quality or state of being reliable, trustworthy and accountable. Are you willing to accept responsibility as delegated to you, seek additional responsibility and do you independently carry out assignments within the scope of authority? _____
12. **PLANNING** is to formulate, draw up or make a detailed scheme for the accomplishment of a proposed project or goal. Do you think ahead, organize your work and coordinate work with the work of others? _____
13. **QUANTITY OF WORK** is the amount of work an individual does in a work day. Are you industrious and do you meet production deadlines and emergency demands consistently? _____
14. **QUALITY OF WORK** is the degree of excellence of the finished product. Do you take pride in the appearance of your work and produce a finished product which meets high standards? _____
15. **COST AWARENESS** is the consciousness and alertness to the amount paid or required in payment for a purchase. Are you conscious of maintaining expenses within a budget and do you strive to reduce costs? _____
16. **INTEREST** is showing curiosity, fascination and concern. Do you show enthusiasm and interest in your work? _____
17. **COOPERATION** is working together toward a common end. Do you seek and promote cooperation and good will when dealing with others? _____

NEIGHBORHOOD HOUSING & DEVELOPMENT

EVALUATION SUMMARY PART I (To be completed by employee)

NAME _____ TITLE _____

I. CAREER INTERESTS (Show specific interests and goals)

II. SELF -EVALUATION (Describe qualifications)

Strengths:

Development & Training Needs:

Reliance:

Have you found ways of working more effectively that are different from methods your peers use? Provide examples.

What are the constraints you face in performing your job?
How do you cope with them?

Judgement:

How do you set priorities for your work assignments?

Are there aspects of your job which you find satisfying or conducive to quality performance? Please explain.

Have you dealt with a difficult or challenging assignment recently? How did you handle it?

III. MANAGEMENT ISSUES (Your comments on policies and programs)

Strengths:

Weaknesses:

Personal:

Do you believe you receive adequate recognition for your performance?

Are your task assignments clearly communicated and sufficiently challenging?

Are deadlines realistic?

D. Suggestions:

NEIGHBORHOOD HOUSING & DEVELOPMENT

EVALUATION SUMMARY PART II

(To be completed by supervisor)

NAME _____ TITLE _____

I. EVALUATION OF PERFORMANCE AND QUALIFICATIONS

Performance:

Describe individual's overall performance on present assignments in terms of major objectives:

- * Compliance with Directives
- * Compliance with Deadlines
- * Reliability
- * Team Effort skills
- * Comprehension
- * Knowledge

Describe special accomplishments.

Qualifications: (Describe qualifications).

Strengths:

- * Communication, written & verbal skills
- * Team leadership and decision-making abilities
- * Motivation, adaptability

Development Needs:

- * Training
- * Seminars

VII. SECRETARIAL PROCEDURES

The secretarial support staff's performance is representative of the entire Neighborhood Housing and Development department. The professionalism and work standards exhibited by this team has a clear connection to the overall department performance. An efficient and quality-oriented support team can make or break the smooth operation of a department.

Since the support staff are such an integral part of the department of Neighborhood Housing and Development, the need to identify expectations for both the support team and other department members is crucial to the smooth operation of the department. This section outlines and details the responsibilities and systems used by the secretarial support staff.

Team Approach

In addition to handling their assigned responsibilities, the secretarial staff works as a team to ensure that all necessary assignments are done in a quality and timely manner. Marta DeJesus acts as coordinator of the team in the event a special project or heavy workload requires that the support staff work in unison. Marta is also the liaison between the support team and management staff. The support staff are encouraged to ask for help with their workloads when necessary and to seek advise in prioritizing assignments.

Professionalism

The support team is expected at all times to perform their responsibilities in a professional manner. The team's desks and work area should be kept neat and as clear of clutter as possible. Generally, only business should be conducted at the work area - personal calls, socializing and lunches should not take place at the work stations.

As with the rest of the department, support staff are asked to arrive on time and work with each other to schedule lunches so that the area is covered at all times. Generally, lunches should be taken between 11:00 and 2:30 p.m., unless emergency dictates otherwise. Exceptions are made in the case of personal appointments. In that case, Marta DeJesus should be notified as soon as possible so scheduling can be coordinated.

Cross Training

A central goal of the support team is to provide the department the best support services possible. The team is constantly in the process of "Cross training" so that they are able to step in and assist each other in the event of heavy workload or absence. This system also provides the opportunity to share ideas and shortcuts that allow the team to improve efficiency.

B. COMPONENTS

The following components of secretarial procedures are described in greater detail on the pages that follow:

- 1) Document Identification System
- 2) Assistant Director's Mail
- 3) Assistant Director's Phone Log
- 4) Assistant Director's Calendar

1) DOCUMENT IDENTIFICATION SYSTEM

Activity Description: The support staff has developed a system for identifying documents very similar to the system used by the Word Processing department. Each document produced will have an identifier or footer in the bottom left hand corner of each page. The same identifier will act as the file name listed in the disk directory of the computer. A sample follows:

Each identifier will have three different pieces of information such as RF2/04.BME.

- * The RF2 refers to Ron Fong's disk #2
- * 04 refers to the 4th document on the disk
- * BME refers to the type of document - in this case, a board memo

Performance Criteria: System enables support staff to identify and locate documents more efficiently. Systems eliminates confusion when staff share workloads.

Procedures:

NAME	ACTIVITY
Staff	Assigns one floppy disk for each primary person that he/she supports
Staff	Assigns a footer/file name to each document according to the system described above
Staff	Updates disk directory as new documents are completed, including file name and a brief description
Staff	Disks are kept in central file boxes in each of the work areas for easy access

2) ASSISTANT DIRECTOR'S MAIL

Activity Description: Appropriate handling of the Assistant Director's mail will improve the quality and timeliness of responses. To achieve this goal, a staff person is assigned to open and review daily mail, distribute copies to appropriate staff, and organize the remaining mail.

Procedures:

NAME	ACTIVITY
Lynn	Opens, copies and distributes with the department's mail twice daily
Layzer	Acts as back up to Lynn
DeJesus	Reviews mails, prioritizes mail package at the end of each day. Submits in a file, along with a file of documents to be signed and a file of materials needed for meetings the following day.
DeJesus	Assist with any related responses or filing of Assistant Director's mail
Support Staff	Acts as back up to DeJesus

3) ASSISTANT DIRECTOR'S PHONE LOG

Activity Description: The handling of the Assistant Director's phone calls has been formalized to guarantee consistency and responsiveness. Staff is currently using a manual system, but is in the process of training so that Lotus Agenda will be used to track calls and responses.

Procedures:

NAME	ACTIVITY
DeJesus	Receives call; records message
Support Staff	Acts as back up for DeJesus
DeJesus	Prepares daily call log; copies to Assistant Director at end of day
Wilson	Responds on behalf of Assistant Director to some calls
Williams	Delegates all other calls or handles personally
DeJesus	Keeps a chronological binder of all call logs

4) ASSISTANT DIRECTOR'S CALENDAR

Activity Description: A daily calendar of the Assistant Director's appointments is kept on DeJesus' desk. DeJesus schedules all of the Assistant Director's appointments. Owens and Rice assist as needed.

Procedures:

NAME	ACTIVITY
DeJesus	Schedules Williams' appointments
DeJesus	At the end of each day prepares a wallet card for the next day
DeJesus	Schedules all department staff meetings; schedules meeting room; distributes notification to staff; records on department calendar
Support Staff	Acts as back up for DeJesus

